Arizona CHOICES
Access to Recovery

Voucher Management System (VMS)

Training Manual
For Case Managers

Welcome to the Voucher Management System (VMS)!

This web-based tool is used to manage the referrals and vouchers issued to Access to Recovery Drug Court Clients for treatment and recovery support services.

Within the course of providing services to Drug Court Clients, information flows through several AREAS. Each AREA has responsibilities in VMS to ensure that the information flows GOOD.

The five sections in this manual focus on the steps in VMS specific to the responsibilities of the Drug Court Case Managers.

If you ever have questions on how to maneuver through the VMS system, please feel free to contact Pima Prevention Partnership at:

azatrhelp@thepartnership.us

1-866-476-5777

Help is available Monday through Friday, 8:00 am to 5:00 pm. We will make every attempt to respond within one business day.

Section One: Getting Started

In this section you will:

- Find out where to go on the internet to access the VMS system and learn about your password.
- Become familiar with the components on the VMS home page.

Section Two: Client Intake

In this section you will learn how to:

- Create a client profile and enter client intake information.
- Enter a client GPRA.
- Confirm client consent for release of information to providers.

Section Three: Client Services Management

In this section you will learn how to:

- Refer clients to participating providers
- Issue vouchers to providers for client treatment or recovery support services
- Look up client GPRA interview schedules.
- Close a client record

Section Four: Claim Batches

In this section you will learn how to:

- Review the provider claim batches
- Accept or reject a provider claim batch

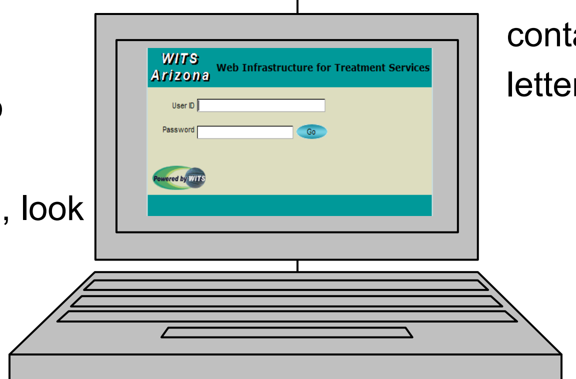
Section Five: VMS Reports

In this section you will learn how to:

- Locate the report templates available through VMS.

Before You Start...

- ✓ Use Internet Explorer as your web browser. The VMS does not work well with other web browsers.
- ✓ Please note that the website address does not include “www” at the beginning.
- ✓ “Maximize” your screen by clicking on the icon in the top right corner.
- ✓ Always remember to log out of the VMS system. For security reasons, the system is designed to lock out users with open, inactive connections.
- ✓ Many of the screens allow you to download the information into an Excel spreadsheet. To download, look for the *(Export)* link and hold the **CTRL** button down until the prompt to open the file appears.

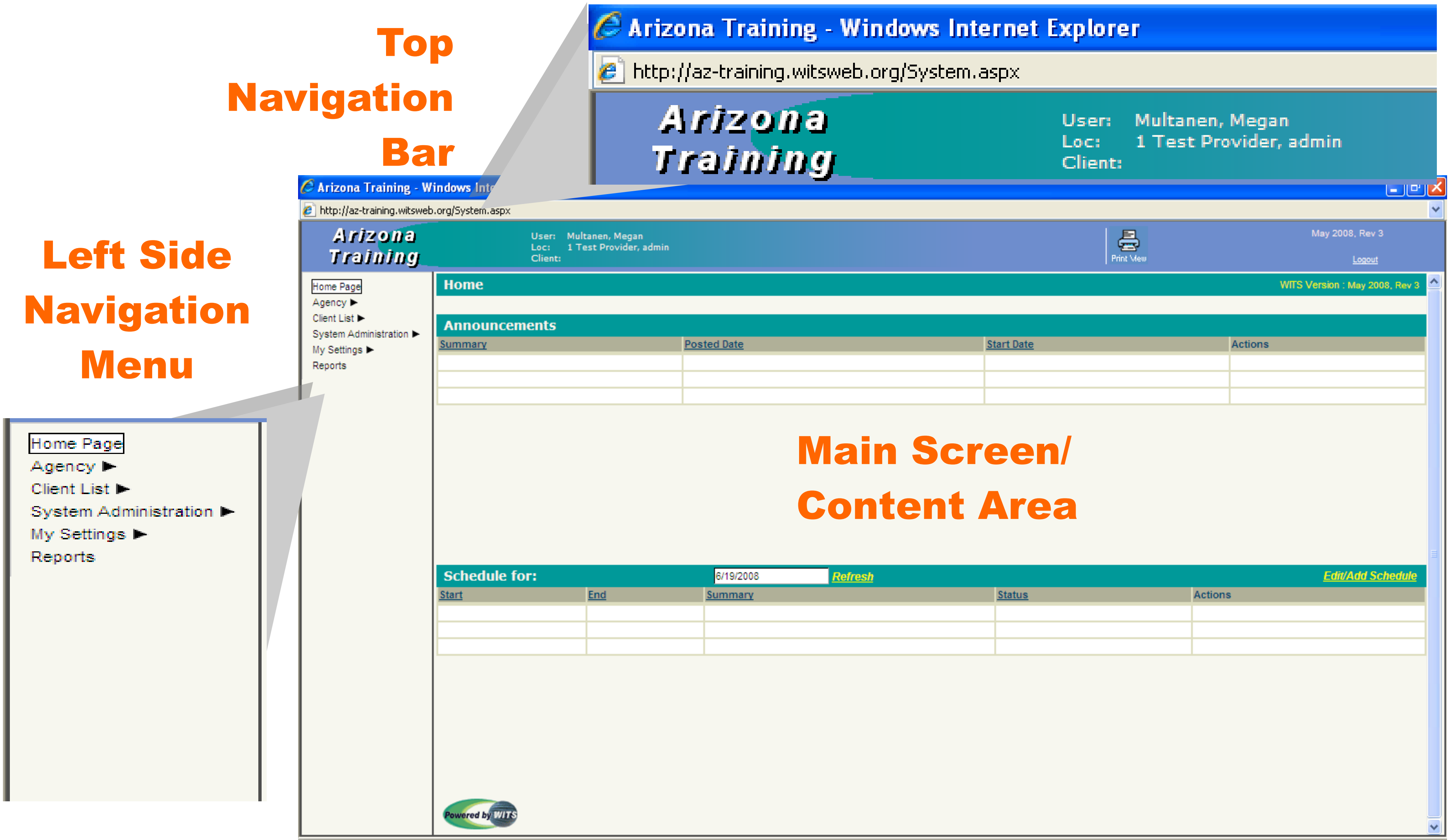


The VMS website address is:

https://az.witsweb.org

Each time you log into the VMS, you will enter a User ID, Password, and PIN.

- You will receive an email with your User ID, Password, and PIN number to use the first time you log into the system.
- Once you log in, you can choose your own Password and PIN. These must be at least six (6) characters long and contain at least one number and one letter.



Top Navigation Bar
Left Side Navigation Menu
Main Screen/ Content Area
Arizona Training - Windows Internet Explorer
http://az-training.witsweb.org/System.aspx
Arizona Training
User: Multanen, Megan
Loc: 1 Test Provider, admin
Client:
Print View
May 2008, Rev 3
Logout
Home Page
Agency
Client List
System Administration
My Settings
Reports
Home
WITS Version : May 2008, Rev 3
Announcements
Summary
Posted Date
Start Date
Actions
Schedule for:
6/19/2008
Refresh
Edit/Add Schedule
Start
End
Summary
Status
Actions
Powered by WITS

The Home Page is the first screen you will see once the login has been accepted.

The *Home Page* has three main parts:

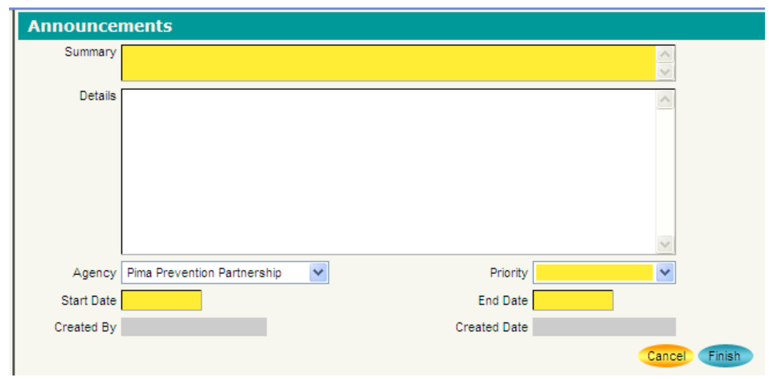
1. The Top Navigation Bar shows your name and the agency to which you are affiliated. When a client record is active, the client name will also appear in the Top Navigation Bar.
2. The left Navigation Menu contains the primary options you have within the VMS system. This menu will be the starting point for many of the procedures.
3. The Main Screen/Content Area on your Home Page will show any announcements or schedule information. The Main Screen also shows the providers when a referral has been made to them.
   - As you navigate through the VMS, this area will show agency, client, referral, or other information based on your location within the system. illustration

<u>Announcements</u>:

VMS has a section for posting announcements, which can be useful for notifying providers about upcoming events or special dates.

To enter an announcement:

1. In the Left Navigation Menu, click on Agency and then Announcements. Click on the Add New Announcement link to open the Announcements screen.
2. Complete the required fields, which are indicated by the yellow highlight.



✓ The dates will set the time period for which the announcement will appear on the Provider’s Home Page.

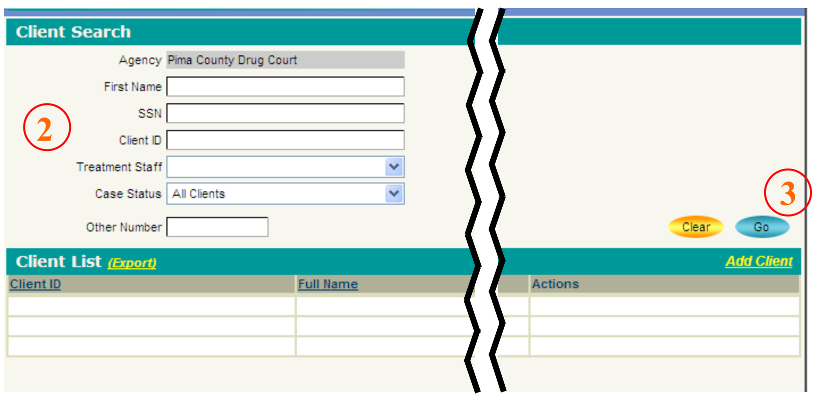
✓ Any additional information regarding the announcement can be entered into the Details box.

✓ **Before entering a new client, always search the VMS to make sure the client is not already in the system**

To search for a client:

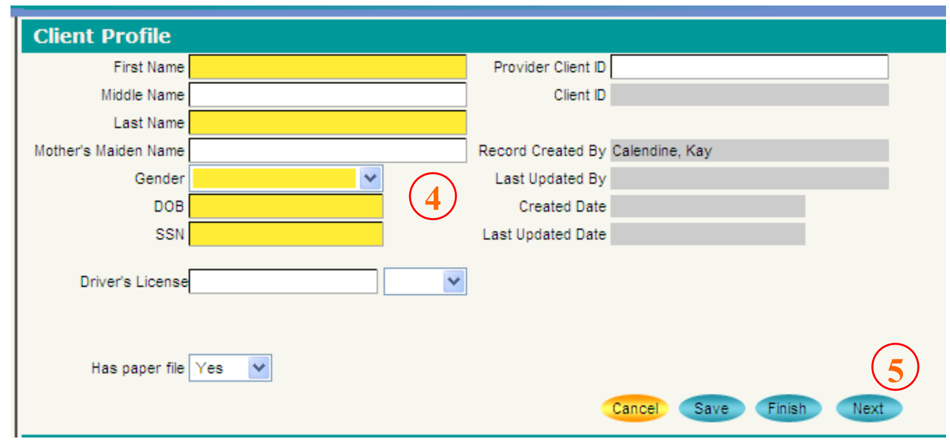
1. Click on the Agency, and then the Client List link in the Left-side Navigation Menu.

2. Enter the client's name, and any other client information you have, in the Client Search section. The system searches for client records based on these fields. The more information that is included, the more specific the search results will be.



- You can also enter a partial name followed by a " * " if you are not sure of the exact spelling.
- If you leave all of the fields blank, the search will bring up a list of all the clients.

After verifying that the client is not already in the system, create a new client profile:



3. On the same page where you performed the client search, click on the Add Client link located on the Client List header. A Client Profile screen will appear.

4. Enter the client information. Any fields highlighted in yellow are required; the VMS will not allow you to continue until these are completed.

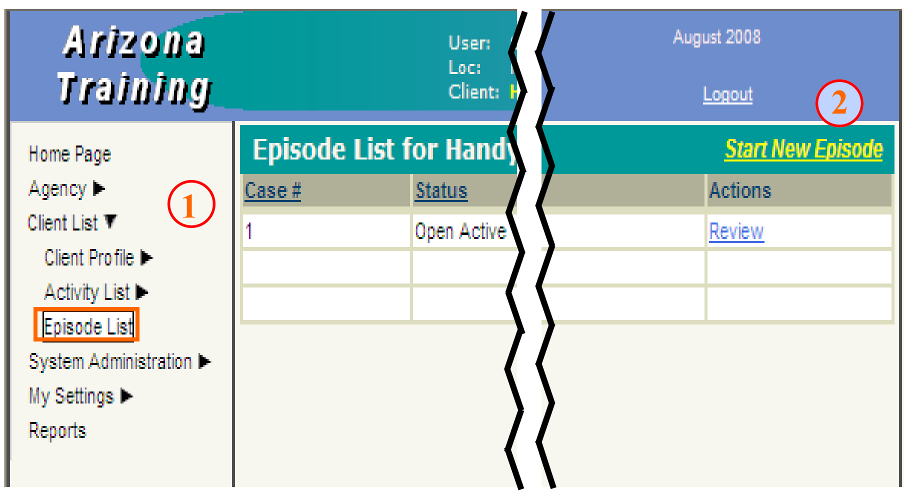
5. If you would like to add additional client information, such as alternate names, phone numbers, or other details, click on the **Next** button.

To begin, check that the appropriate client name appears in the Top Navigation Bar.

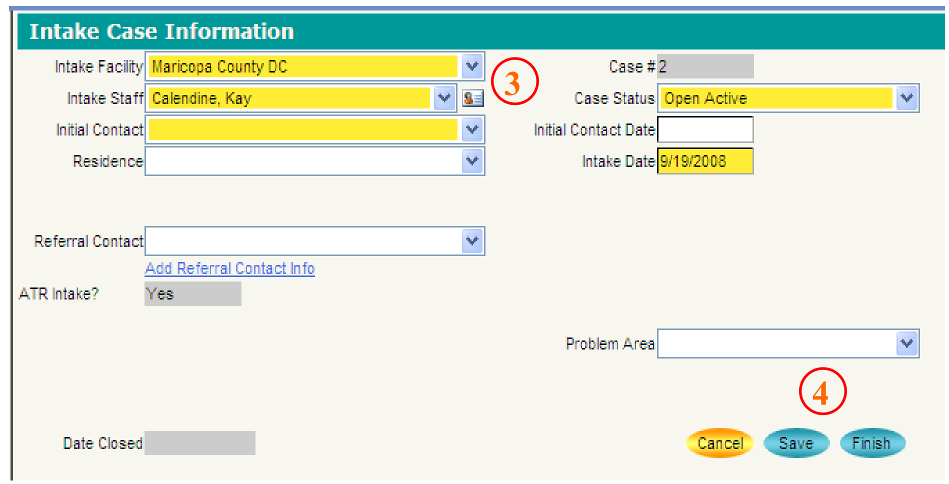
If this is not the correct client, search for the client using the steps outlined on page 6.

Creating a Client Intake:

1. Click on the Episode List link in the Left Navigation Menu.
2. Click on the Start New Episode link.



The Start New Episode link will open the Intake Case Information page.



3. Enter the appropriate information in the yellow highlighted fields.

   ✓ Although the Residence drop-down menu is not highlighted in yellow, the client's county of residence must also be entered.

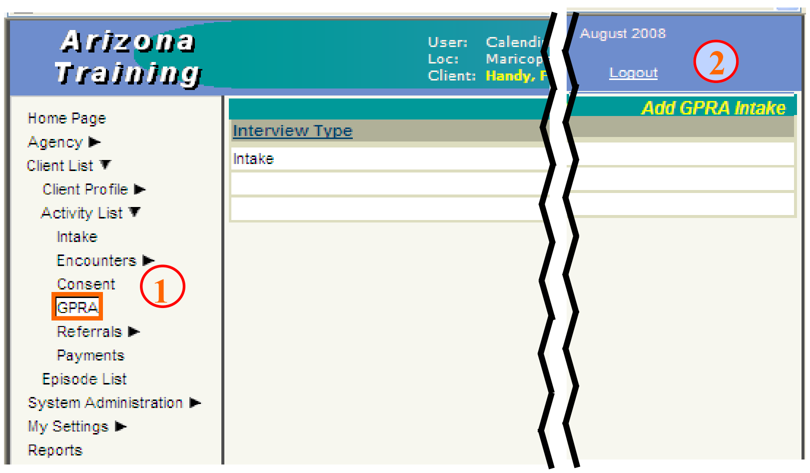
4. Click on the **Save** or **Finish** button to complete the Client Intake.

The client's GPRA and Service Provider consent information can now be entered by clicking on the links in the Left Navigation Menu.

Clients who screen Positive for the ATR Program will need to have GPRA information recorded in the VMS before referrals can be made or services provided.

Entering the Client GPRA:

1. Start by opening the Client Profile Activity List menu. Click on the GPRA link to open the Interview Type List.



2. Click on the Add GPRA Intake link to open a new GPRA record.

If this is the client's first GPRA, only the Add GPRA Intake link will show. Later, there will be options to add an exit GPRA and a 6-month GPRA.

3. Complete the appropriate fields in the GPRA record, using the Next button to move through each section.

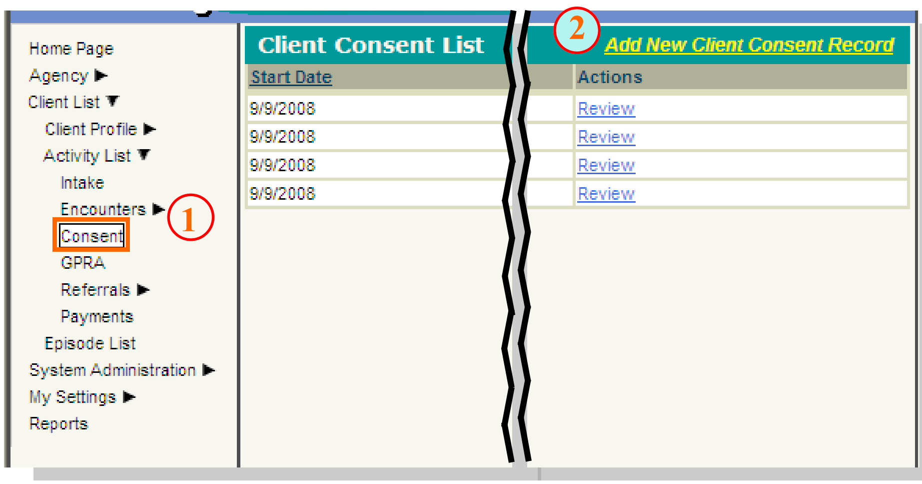
✓ The sections are also displayed in the Left Navigation Menu. If the GPRA should need to be edited, these links will give quick access to the right section.

The GPRA Interview record will now be listed under the Interview Type on the GPRA page. To view the summary, or to edit the GPRA at a later time, return to the GPRA page in the client's Activity List, and click on the Edit or Review button.

Before referral information can be released to a Service Provider, the client must first consent to have that information released. This is required for each Provider to which the client will be referred.

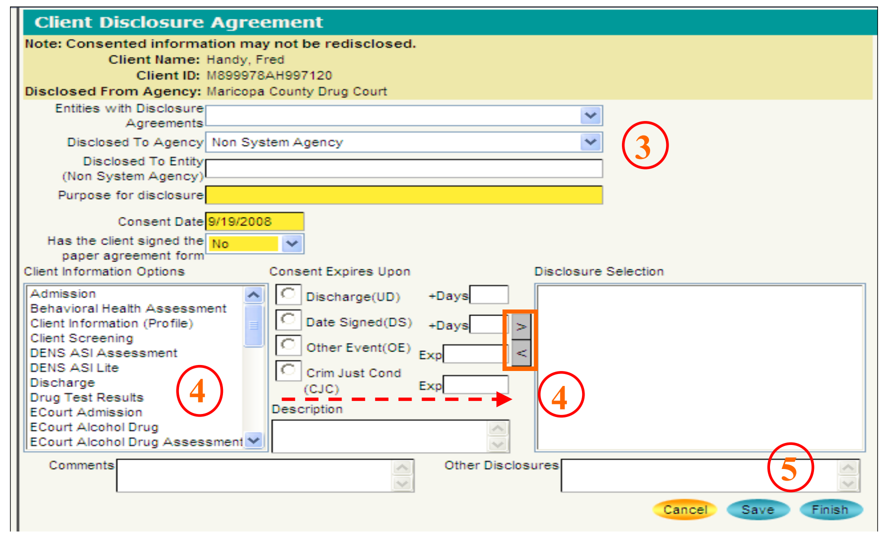
<u>Creating a Client Consent:</u>

1. If the Intake page has just been completed, the menu in the Left Navigation Bar will have a link to the consent page. If not, it can be accessed through the Client Profile Activity List menu.



2. Click on the Consent link to open the Client Consent list, and then on the Add New Client Consent link to open the Client Disclosure Agreement Page.

3. The Disclosed to Agency, Purpose for Disclosure, Consent Date, and verification of signed paper consent are required fields.



✓ The Entities with Disclosure Agreements menu will show only the Service Providers with which the Drug Courts have Disclosure Agreements and will automatically complete the Disclosed to Agency field when one is chosen from this list.

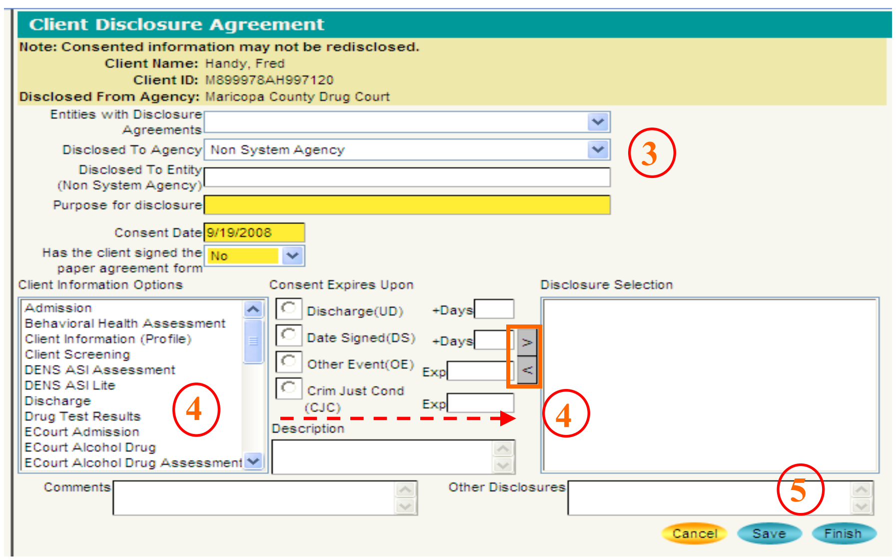
Section Two:

Client Intake

✓ Creating Client Consents (cont)

4. In the Client Information Options box, choose the information to be disclosed, then complete the Consent Expires Upon section. Click on the gray arrow to move the information into the Disclosure Selection. Information can be removed from this box by clicking on the gray return arrow.

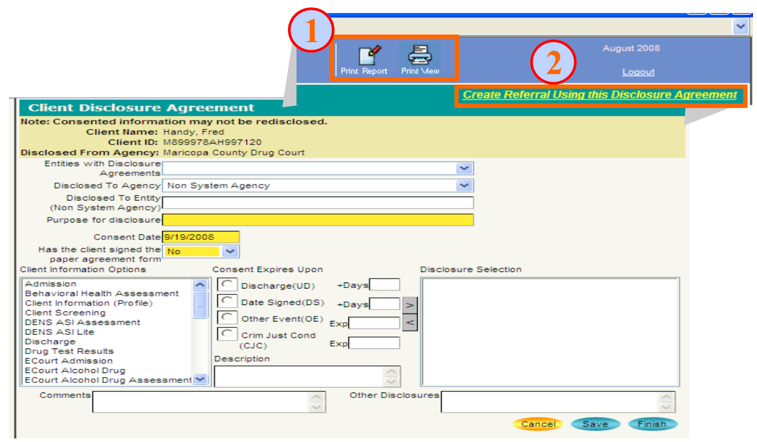
5. Complete the Consent by clicking on the **Save** or **Finish** button.



It is essential that the client's consent is stored in both the VMS and as a signed paper copy in the client's file. Once the consent has been entered into VMS, the system can generate a paper form for signature.

Printing a Client Consent:

1. Once the Client Disclosure Agreement has been completed and saved, click on the Print Report icon located on the right side of the Top Navigation Bar.



✓ To open the report, press and hold the Ctrl button until the new window opens.

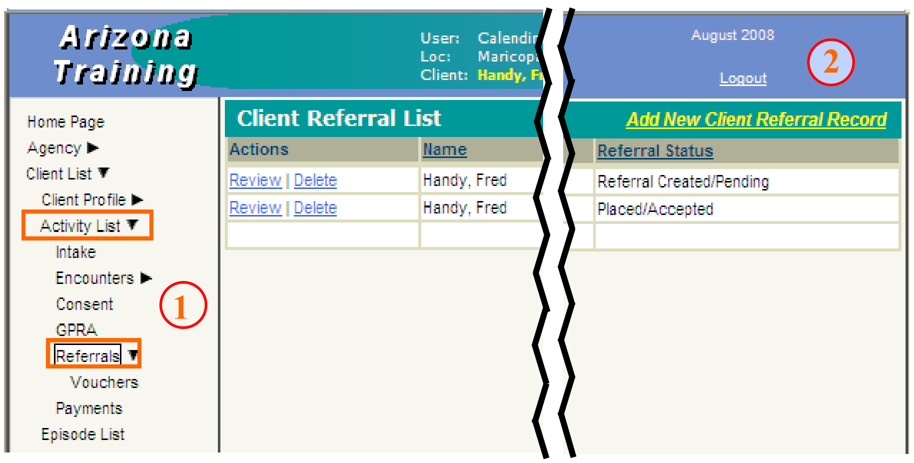
2. Click on the Create Referral Using this Disclosure Agreement link to be redirected to the Referral Screen. Instructions for creating a referral are given in Section Three, page 11.

Once the client record has been completed, the system is ready to accept referrals and vouchers, and you can begin referring clients to service providers.

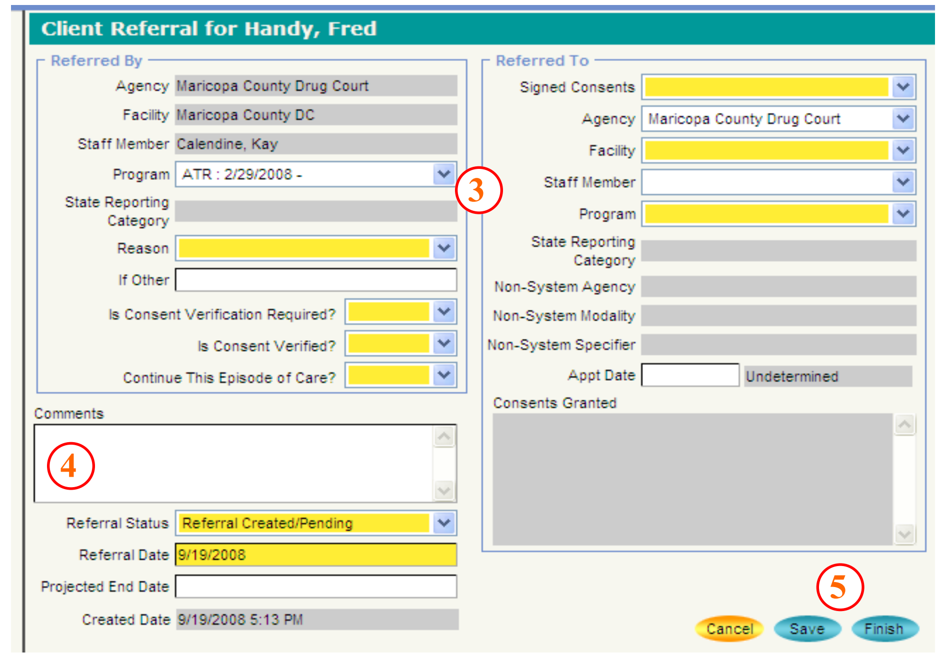
<u>To create a client referral:</u>

1. Click on the Referrals link located in the client's Activity List under Client Profile.

✓ The client name displayed in the Top Navigation Bar indicates which client record is active. If this referral is for a different client, search for the appropriate client using the steps outlined on page 6.



2. Click on the Add New Client Referral Record.



3. Enter the information for the required fields highlighted in yellow.

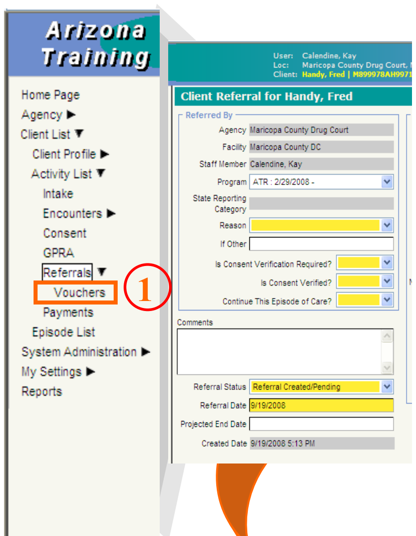
4. Enter any comments you would like the Provider to see regarding this client referral.

5. Click on the **Save** or **Finish** button to complete the referral.

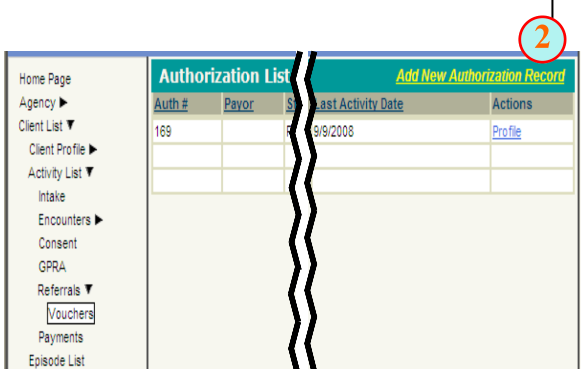
Vouchers are connected to specific referrals, and the client referral screen must be open before a voucher can be issued. If necessary, search for the appropriate client and go to the referral screen located in the Client List Activity List.

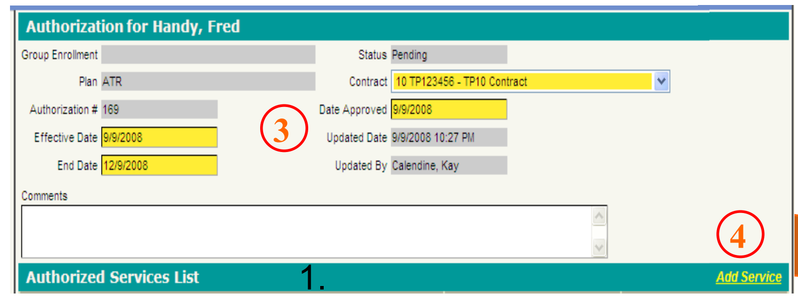
<u>To issue a voucher:</u>

1. Click on Vouchers to open the Authorization List Screen.

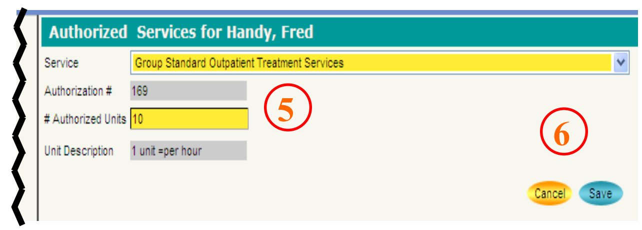


2. Click on [Add New Authorization Record]().
3. Enter the required information.
4. Click on [Add Service](). This will open the Authorized Services page.





5. Choose the service associated to this voucher from the drop-down menu and the number of Authorized Units.



✓ The service drop-down menu will show only the services available from the specified provider.

6. Click on the Save button to finalize the voucher.

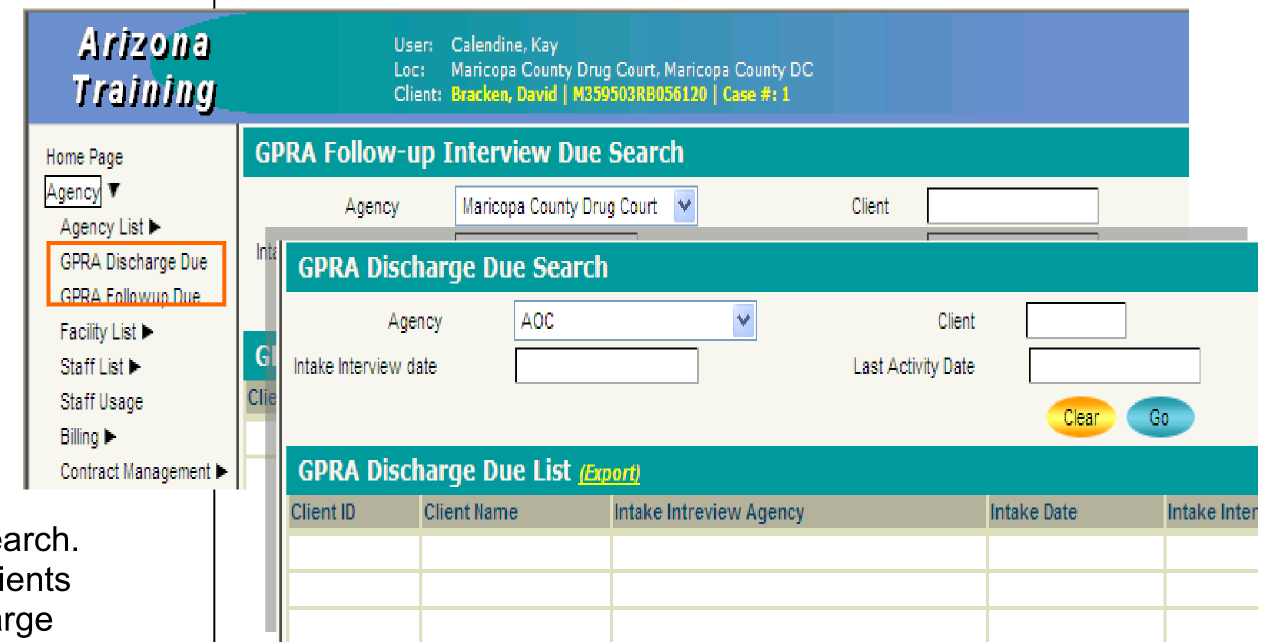
✓ To add a second voucher to this referral, return to the Authorization List and click on the Add New Authorization Record link.

The VMS has the ability to generate a list of GPRA interview due dates for active clients.

To generate the GPRA interview list:

1. Under the Agency link in the Left Navigation Menu, are links entitled GPRA Discharge Due and GPRA Followup Due.

This link will open a search screen where the list can be filtered by Intake Interview Date or Agency



2. Click on the GO button to run the search. When the search is complete, a list of clients will show in the GPRA Follow-up/Discharge Due List.

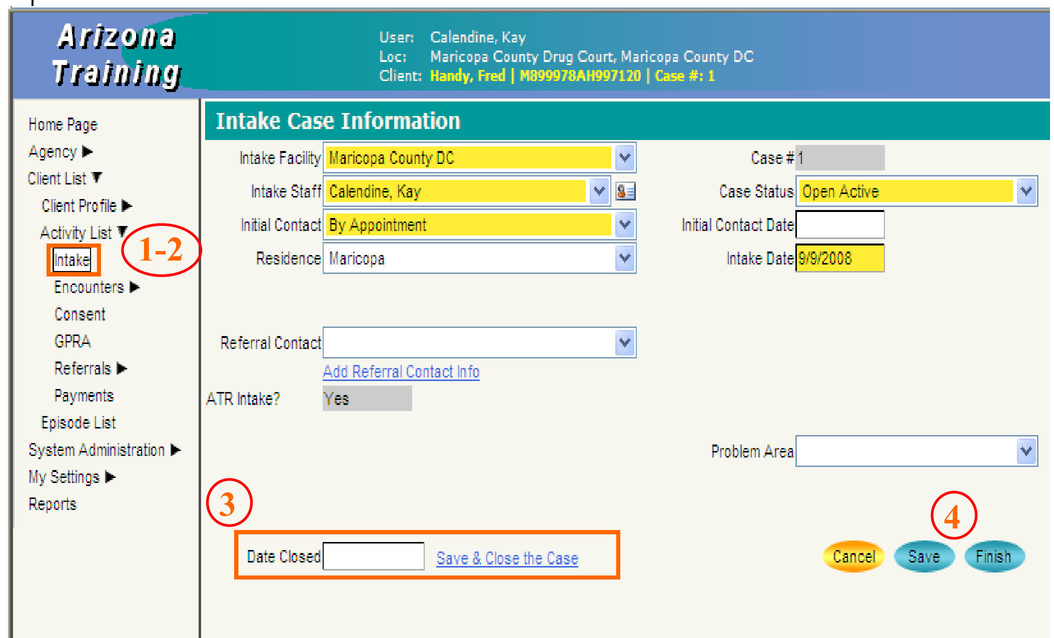
3. The Action column contains a link directly to the client's profile page.

When a client has been discharged from the ATR Program, it is necessary to close the client record in the VMS system as well.

✓ Please refer to the ATR Policies and Procedures for an explanation of circumstances under which a client will be discharged from the program.

To begin, open the client's VMS record by searching for the client using the steps outlined on page 6.

1. Click on the Activity List link
2. Click on the Intake link
3. Enter the desired date in the "Date Closed" field and click the Save & Close the Case link
4. Click on the Finish button to complete the action.



✓ Once a client record is closed, it cannot be edited or viewed. A new record will need to created for clients re-entering the ATR Program.

Section Four:

Claim Batches

✓ **Reviewing Claim Batch**

The final action needed from the Drug Court Case Managers in the VMS is to review the Provider claim batches. This requires the Case Manager to be logged in under the generic GOCYF login password and PIN.

To review a Provider Claim Batch:

1. From the Agency link in the Left Side Navigation Menu, click on Payor Adjudication and then on Claim Submission.
2. Search for claim submissions using the search screen.

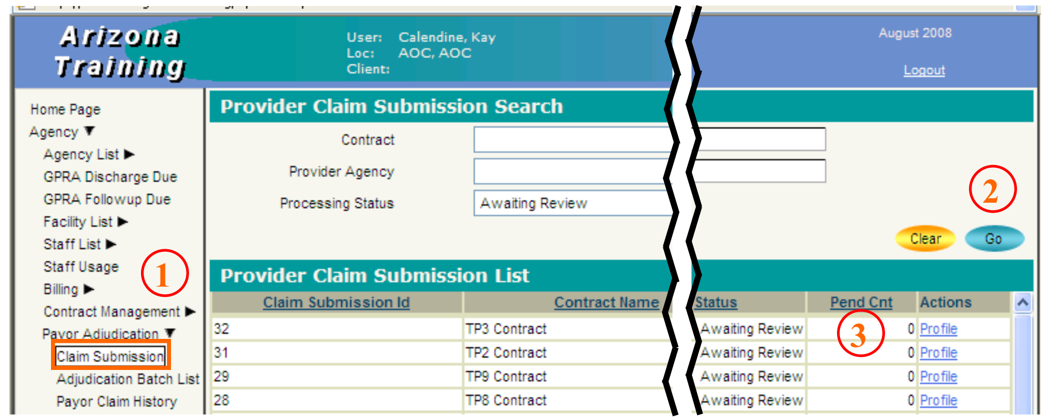
✓ The Processing Status field has three options:

Awaiting Review: Need to be reviewed.

Queued: Provider has submitted claim, but the pre-adjudication rules process have not run.

Accepted: The claim batch has been reviewed and accepted. This status releases the claim and it is adjudicated and paid.

Rejected: The claim batch has been reviewed and rejected. This status returns the claims to the Provider for correction.



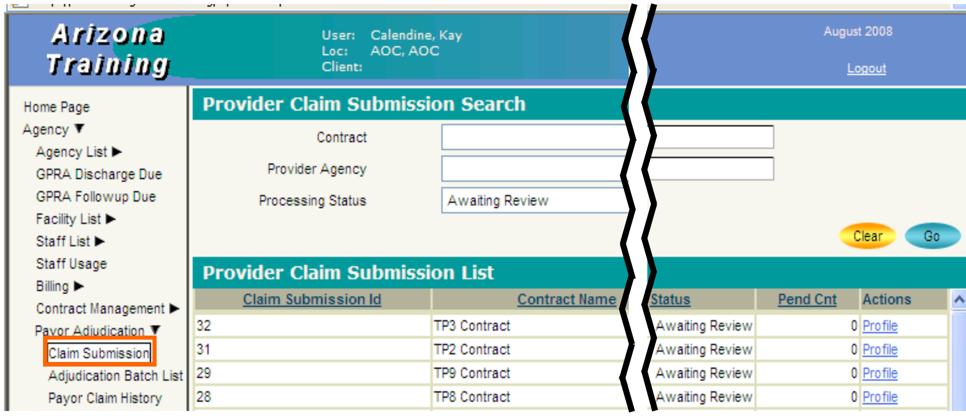
3. In the Actions column, click on the Profile link for the Provider claims being reviewed.

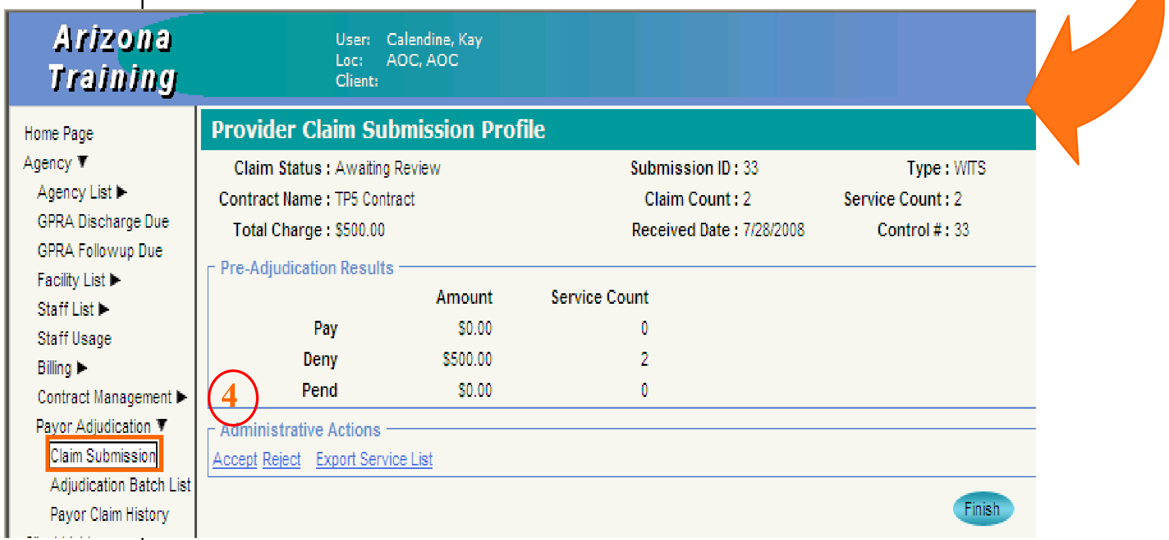
This will bring up the Provider Claim Submission Profile. Here you can see a summary of the results from the pre-adjudication process.

✓ The Export Service List link in the Administrative Actions box will give more details on the claim if you want to see more.

4. Click on the Accept or Reject link to continue the review process.

✓ If the claim is accepted, an email will be generated to the Provider letting them know this. If it is rejected, an email will be generated, and a space for comments will be available to let the Provider know the reason for the claim batch rejection.





Section Five: VMS Reports

✓ Viewing Available Reports

The VMS offers several report templates that can either be viewed on screen or exported into an Excel file.

The Excel file generally contains more data information than is shown in the on screen report, and these data can be manipulated.

The on-screen reports are useful for a quick review of the information.

Remember: To export the information to an Excel file, you must hold down the CTRL key until you are prompted to either save or open the file

To view the reports:

1. From the Home Page screen, click on the Reports link in the left navigation menu. This will bring up a list of available reports.
2. Click on the appropriate report name.
3. Choose the report parameters.
4. Three buttons provide action choices.

✓ On Screen displays the results in the current window.

✓ Export creates an Excel spreadsheet containing

Category	Report Name	Report Description
Billing	Aging and Trial Balance	Serves as both an aging and trial balance report. The aging portion quickly identifies the most delinquent invoices. The trial balance portion provides situational detail to support the aging portion.
	Authorized Services	Details the authorized services for each plan. Some fields are only shown once.
	Claims Reconciliation	Report enables providers to reconcile claims with paid invoices. Allows providers to determine whether an invoice has been paid and find which claims have been paid on each invoice.
	Contract Summary	Shows transaction history, including date, type, ID, authorized amount, and expended amount for a given contract in a given fiscal year.
ATR	A1-Access to Recovery Providers	Gives the number of providers separated by treatment vs. recovery and faith-based vs. secular.
	ATR Clients Interviewed by Week	Shows the number of clients with at least one interview/assessment over historical weekly periods based on the date of the interview. Also shows separate counts and running total of the clients interviewed at FBOs and at non-FBOs.
	ATR Interview Compliance Report	Shows the percentage of the compliance of the ATR interviews in a given time range.
	ATR Vouchers Issued by Week	Shows the number of vouchers issued over historical weekly periods based on the date the voucher was created.
	Monthly Client/Voucher Summary	Opens Excel spreadsheet containing client voucher summaries.
	Vouched Services by Agency	Shows vouched services by agency.
	Voucher Service Life and Cap	Displays the number of vouched units, vouched minimum and maximum amounts, and average length of voucher life.
	Voucher Status Dashboard	Shows status of vouchers for a given agency.

Section Five: VMS Reports

✓ **Viewing Available Reports**

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